

# Wisconsin Functional Screen

## Technical Assistance Document

ISSUE DATE: 4/29/2006

### APPLICABILITY:

- ☒ Adult Long Term Care
- ☒ Children's Long Term Support
- ☒ Mental Health/AODA

**TOPIC:** Archiving Screens

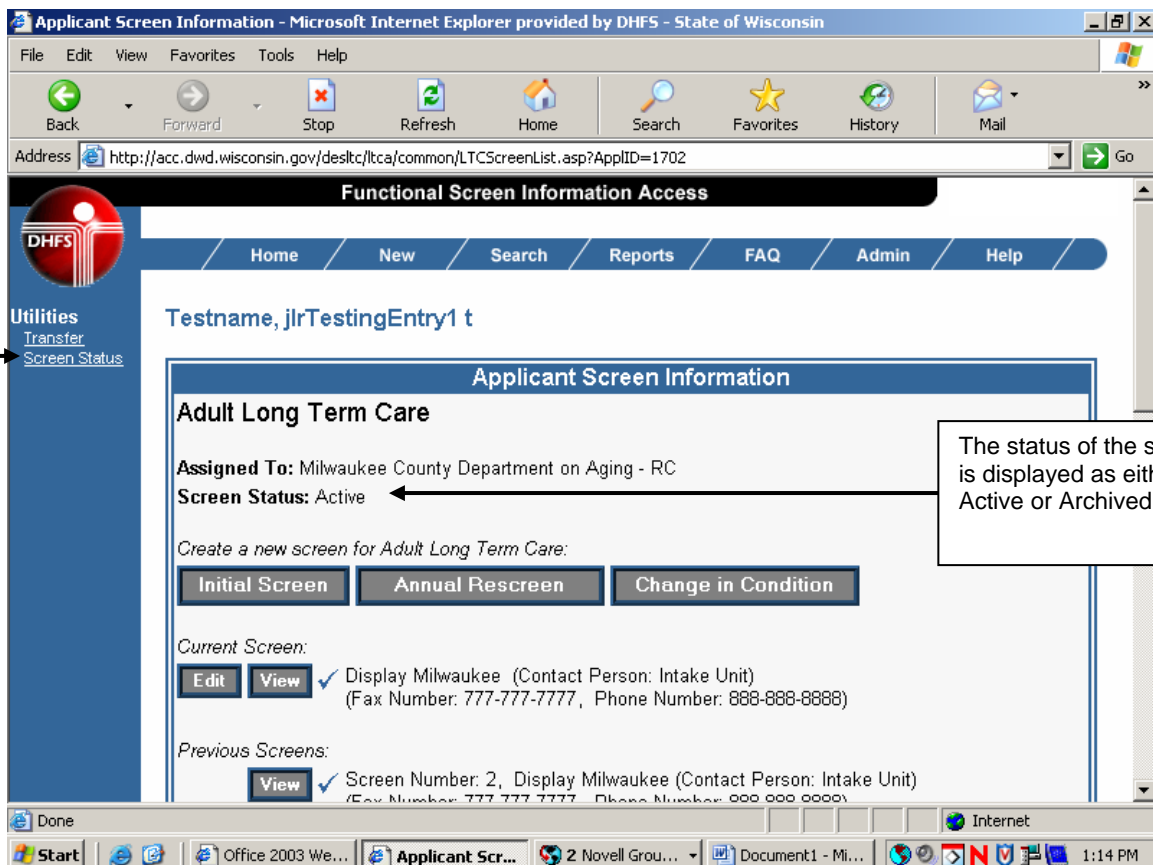
### Background

Screeners using the reporting features of the functional screening tool needed a method to exclude certain screens from their reports. As time passes applicants may expire, disenroll, or disappear and these applicants become dormant. Over time these types of dormant applicants accumulate and an agency's report(s) will grow in size. These dormant applicants clutter up the reports making the reports difficult to use for those agencies that use reports for operational purposes. Agencies that use reports for operational purposes are more concerned about active applicants than the dormant applicants. The archiving function provides agencies with a method to filter screens by status ('Active' or 'Archived').

### Archiving Process

The archiving process allows users to update the status of an existing applicant's functional screen to either 'Active' or 'Archived' for a particular functional screen category (e.g., LTC, Children's, MH/AODA). This is to indicate to the user an applicant's current status in the system.

Existing screens have been defaulted to 'Active' and when a new applicant is entered, initial screens are set to 'Active'. To access the Screen Status Utility use the 'Screen Status' link from the Applicant Screen Information page.



Select the screen status and the functional screen category to **update** an applicant's status for the functional screen. A screen status update occurs at the applicant and functional screen category level (e.g., Adult LTC, Children's, MH/AODA). Users can only update the status of functional screens for applicants that are complete (i.e., eligibility has been calculated) and are assigned to the user's agency for the functional screen category specified. The screen status is unique to each screen category (e.g., LTC, Child's, MH/AODA). For example, an adult screen for an applicant could have a screen status of 'Archived', but the Children's and MH/AODA screen for the same applicant could be 'Active'.

**Update Screen Status**

**Applicant Name:** Testname, jlrTestingEntry1 testing (SSN: 505-10-0205)

The screen status(es) for jlrTestingEntry1's current screen(s) are as follows:

Screen Status	FS Screen Category
Active	Adult LTC
Archived	Mental Health / AODA

To change jlrTestingEntry1's functional screen status, please select a screen status from the choices below:.

- Choose One -  
 - Choose One -  
 Active  
 Archived

☐ Adult LTC  
☐ Mental Health / AODA

**Update**

Before the screen status update is finalized, the user is shown a breakdown of how the new screen status(s) will be applied to each of the functional screen categories (e.g., LTC, Children's, MH/AODA). If the user is confident of the results, he or she will **confirm** the status change and will be returned to the homepage. Otherwise, the user is able to go back and edit the screen status update.

Confirm Screen Status Change - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail

Address http://acc.dwd.wisconsin.gov/deslct/LTCA/ScreenStatus/LTCAAppScrnStatusConfirm.asp?ApplID=1702 Go

Functional Screen Information Access Sign-off

DHFS Home New Search Reports FAQ Admin Help

### Confirm Screen Status Change

**Applicant Name:** Testname, jlrTestingEntry1 testing (SSN: 505-10-0205)

**New Screen Status:** Archived

**FS Category(ies):** Mental Health

**Updating:**

After screen status confirmation, the following screen categories and their corresponding screen status(s) will be saved.

Screen Status	FS Screen Category
Active	Adult LTC
Archived	Mental Health LTS

Previous Confirm

Done 3 Internet Explorer 2 Novell GroupWise 32... Document1 - Microsoft ... Internet 1:47 PM

## Reports

On the criteria page for each report, a 'Screen Archive Status' field has been added to allow the user to select the types of screens that should be displayed in the report. The options for the selection criteria are All, Active, or Archived.

Select screen status

**Screen Summary Report: Criteria**

Select County to filter Assigned to Agency dropdown (optional):  
County: All

Select desired screen criteria:  
Assigned To Agency: All  
Screener: Rounds, Joyced  
Status: All  
Screen Archive Status: All  
County of Responsibility: All

Select screen completion date range, if desired:  
From: (mm/dd/yyyy)  
To: (mm/dd/yyyy)

Displays status of screen

**Mental Health / AODA**

4/29/2005 - 8:34:21AM

Screen Summary Report  
Screens Displayed: Archived

Agency: Milwaukee County Department on Aging - RC

Applicant Name	Birth Date	SSN	Screener Name	County of Responsibility	County of Residence	Referral Date	Screen Completed	Screen Type	Status
Testname, jrTestingEntry1	03/02/1984	505-10-0205	Mh Screener 2, Test	13 Dane	13 Dane	04/25/2005	04/25/2005	02 Annual screen	Complete